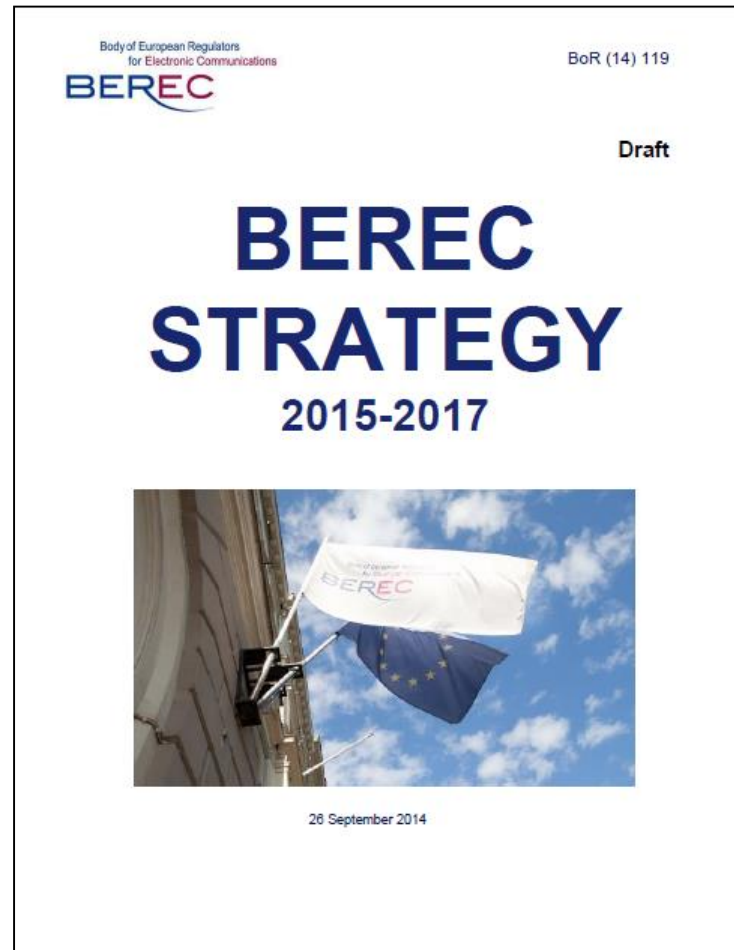


# Draft BEREC Strategy Outlook 2015-17

## Draft Work Program 2015



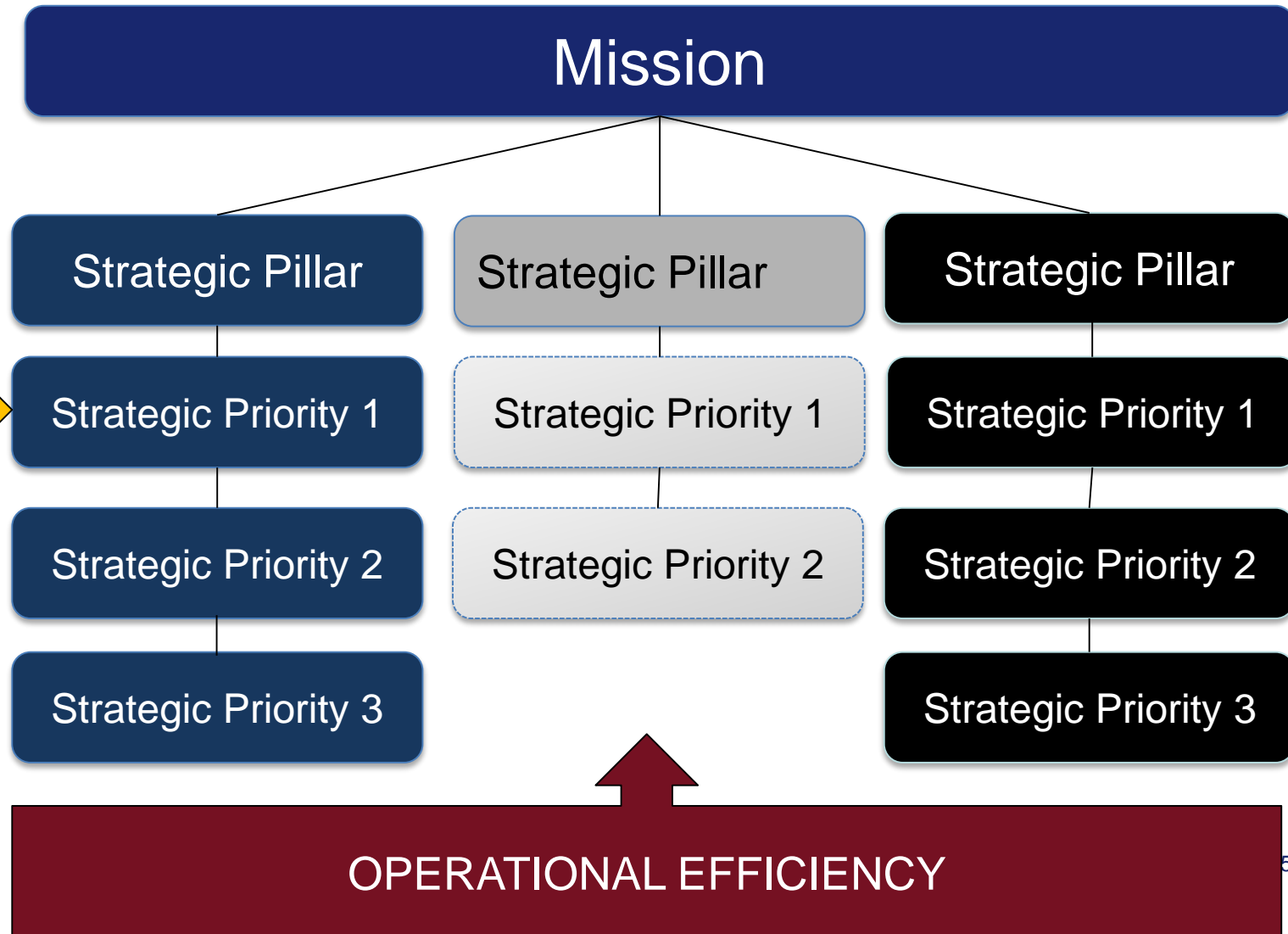
2<sup>nd</sup> BEREC Stakeholder Forum Meeting, 16 October , Brussels



- Not a revolution
- Strategic pillars detailed in strategic priorities
- Identify the challenges + evolutions and to address them
- BEREC : Quality of output, impact to be improved
- Keep it simple & Strategic vision to be reflected in the work programs

1. BACKGROUND AND BEREC MISSION
2. BEREC'S STRATEGIC PILLARS
3. MAJOR TRENDS AND DEVELOPMENT
4. BEREC'S STRATEGIC PRIORITIES
5. QUALITY OF BEREC OUTPUT AND OPERATIONAL EFFICIENCY

Trends & developments



*BEREC is committed to ensuring the independent, consistent, and high-quality application of the European regulatory framework for electronic communications markets for the benefit of Europe and its citizens*

Pillar 1

Promoting  
Competition  
and Investment

Pillar 2

Promoting the  
Internal market

Pillar 3

Empowering  
and protecting  
end-users

Quality of BEREC output and operational efficiency

Bundles services as key driver for competition

Network convergence between fixed and mobile technologies and M2M impact on ecosystems

The growth of OTT services presents challenges and offers new possibilities raising new regulatory challenges

Bandwidth-hungry services & Quality of service becomes critical to future development of the market and of new innovative services

Significant investment in high-speed electronic communications networks across Europe is required

Increased mobile offload to fixed networks, mobile operators' need for fixed access increases

Importance of end-users issues like data protection and privacy, network and information security and reliability

Market consolidation and its impact on investment, competition and European end-users' welfare will need to be carefully monitored



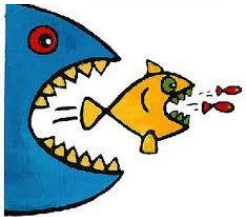
## Technology, market and end-user developments

Growth of OTT, Network Convergence, QOS, Investments, end-users protection, consolidation, bundles



## EU regulatory developments

Impact of new EP/EC Commission on the future regulatory landscape



Review of the European regulatory framework should aim to build on the existing principles, and address the challenges facing the sector:

- how to address the role of OTT players
- challenges posed by market consolidation
- impact of IP technology and fixed/mobile convergence
- future role of symmetric regulation
- ex ante assessments of leverage effects and joint dominance
- review of the Radio Spectrum





Through effective, predictable, and consistent regulation of national wholesale (broadband) markets

■ **Promoting effective competition** requires attention to convergence and consolidation ensure information transparency and ease of switching for end-users

■ **Fostering a favorable climate for investment** in high-speed networks ensuring that market players can operate in an undistorted market

■ **Supporting innovation** ensuring a smooth transition from PSTN to all IP-technology by taking a pro-competitive, technologically neutral and forward-looking approach that supports the development of new business models, while protecting the interests of end-users



Increasing end-user access to services independently from location, device or platform

■ **Supporting convergence**

- support development of IP network technologies
- Address fixed/mobile convergence



■ **Taking down barriers**

- within its sphere of competence: e.g. common approach to net neutrality, harmonized consumer protection framework, EU approach to international mobile roaming, facilitating the provision of pan-European services, cross-border issues
- outside its sphere of competence: cooperate with other relevant bodies (RSPG, ENISA,...)



#### ■ Promoting end-user choice, accessibility and affordability

- ensure end-users are equipped to make informed choices about the increasingly complex products emerging in a convergent environment
- ensure ease of switching to enable end-users to access offers that meet their needs

#### ■ Safeguarding an open internet

- Dealing with issues of Net Neutrality
- Attention to new end-user needs emerging from growing range of new internet applications and services including OTT services
- QoS becomes increasingly important aspect of end-user protection

#### ■ Promoting end-user protection online

- Seeking cooperation with other relevant bodies to improve end-users' trust around data privacy protection, internet security and content regulation



## ■ Ensure that BEREC's output contributes directly to its strategy

- Strategic vision to be reflected in the work programs
- improve work planning in order to make optimum use of its resources



## ■ To be developed at three levels

- by working to improve the quality and consistency of individual NRA decisions through guidelines, best practices, monitoring
- by engaging and cooperating effectively in particular with the Commission and other stakeholders and academic and research communities
- by improving working methods and the quality of the output i.e. Article 7/7a procedures, better use of the BEREC Office support, encouraging participation of all NRAs, improving the efficiency of its decision-making processes



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Trends & developments

Promoting  
Competition and  
Investment

Promoting effective  
competition

Fostering a favorable  
climate for investment

Supporting innovation

Promoting the  
Internal market

Supporting convergence

Taking down barriers

Empowering and  
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Promoting end-user  
choice, accessibility and  
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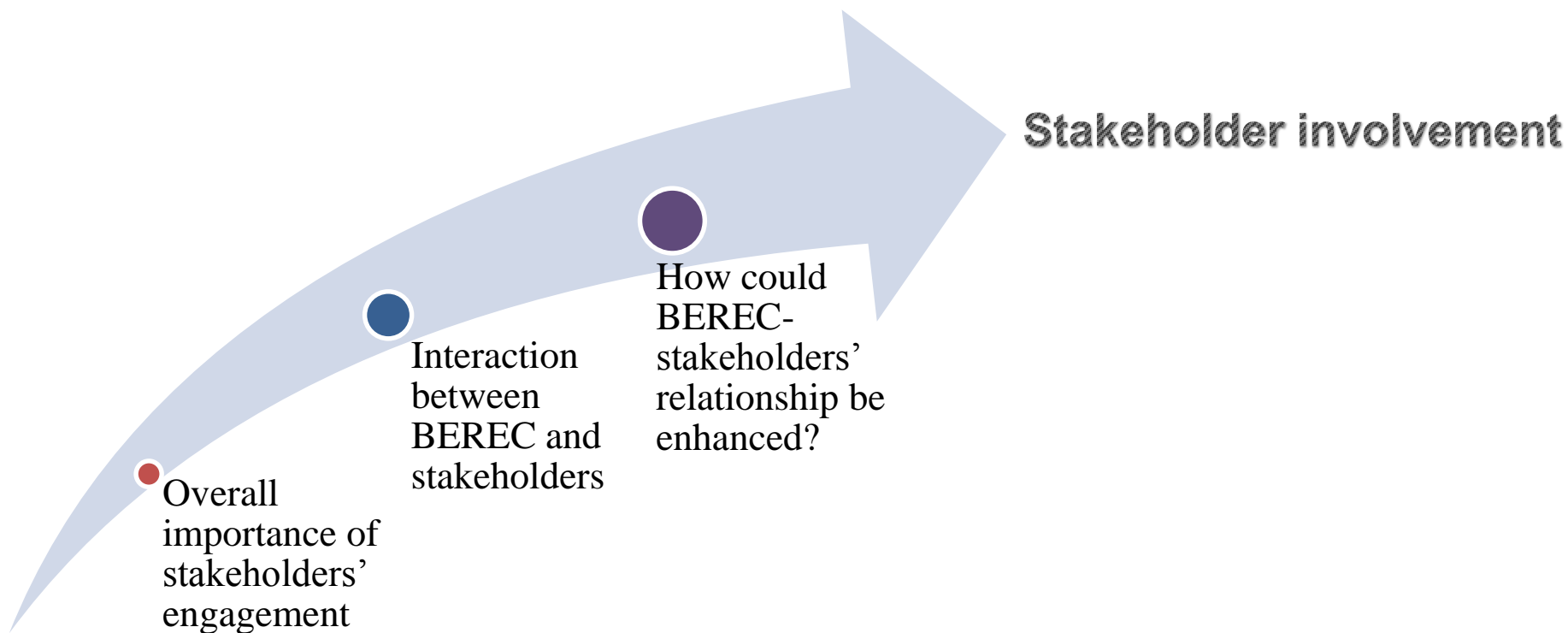
Ensure that BEREC's output contributes directly to its strategy  
**Quality, Cooperation, Methods**

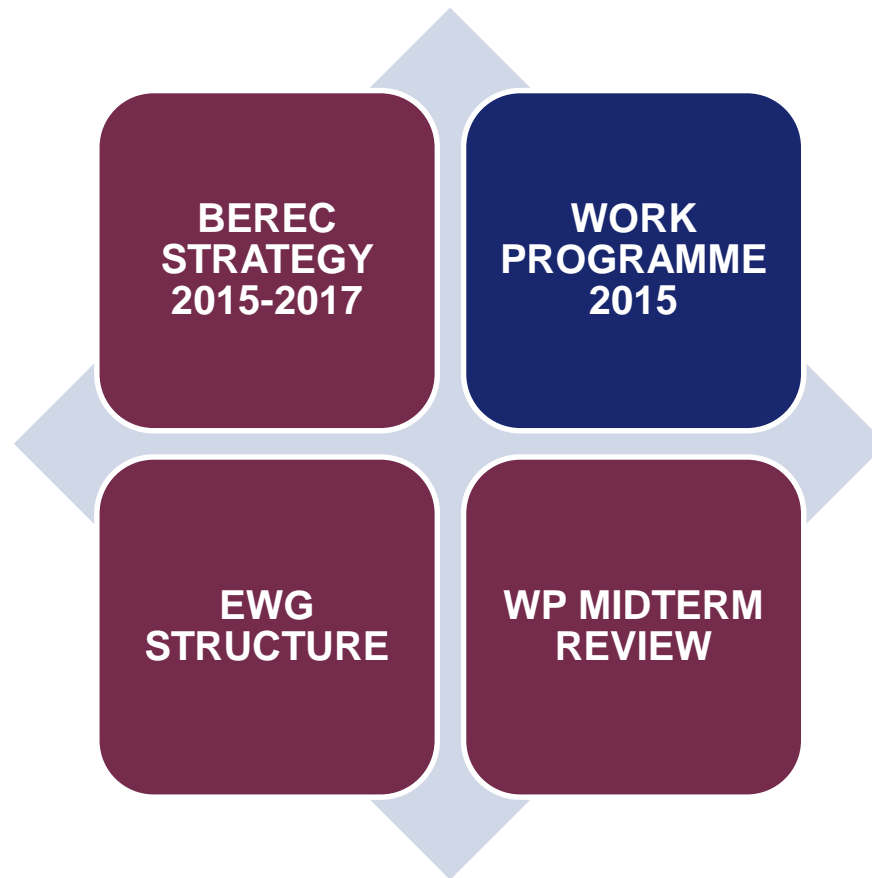
# **Draft BEREC Work Programme 2015**

## **Stakeholders' Forum**

16 October 2014,  
Brussels

## Call for inputs (March 2014) on a BEREC WP 2015 draft outline (NRAs, EWGs' Chairs, BEREC Office, EC, Stakeholders)





**SHORT TERM RESULTS**



- In line with the **BEREC Strategy 2015-2017**
- **Connected Continent Regulation** and the next **Framework Review** will potentially lead to a shift in **BEREC's priorities**
- **Priority assessment** in light of the resources available during the course of the year
- Flexibility and transparency
- Enhancement of BEREC Office's engagement in the BEREC WP

Strategic Priority 1:

**Promoting Competition  
and Investment**

Strategic Priority 2:

**Promoting the Internal  
Market**

Strategic Priority 3:

**Empowering and  
Protecting End-Users**

**Quality of BEREC's output and operational efficiency**

## ■ Wholesale Products

- Monitoring implementation of the BEREC Common Positions on Wholesale Products – 2nd Phase
- Virtual Access Products

## ■ Implementation of the Recommendation on Relevant Markets and Common Position on Geographical Segmentation

## ■ Challenges and drivers of NGA roll-out and infrastructure competition



- Preparing migration to “all IP networks”
- Oligopoly analysis and regulation
- Facilitation of access to radio spectrum



- Article 7/7-A – Phase II
- Implementation of the Recommendation on Termination Rates
- Legislative Evolution
  - Subjects linked with the proposal on a Connected Continent regulation
  - Preparation of the next framework review



## ■ International Roaming

➤ International Roaming Benchmark

➤ Transparency and Comparability of International Roaming Tariffs

## ■ Report on OTT services

## ■ Advanced connectivity of devices, systems and services

## ■ Cross-border regulatory cooperation within the scope of Art. 28 (2) of the Universal Service Directive

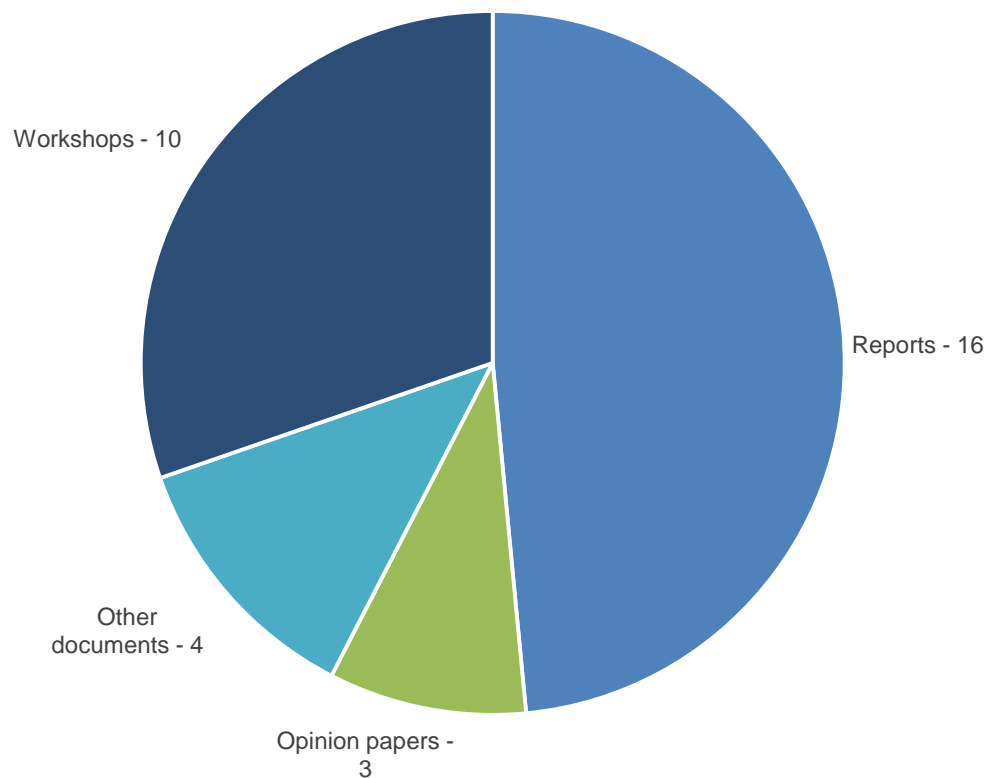
- Broadband quality of service and net neutrality
  - Feasibility study of QoS Monitoring in the context of NN
  - ECODEM – Ecosystems dynamics and demand side forces in net neutrality developments from an end user perspective
  - Traffic Management Investigation
- Review of the scope of the Universal Service
- Initiatives to facilitate operator switching for non-residential customers

- Benchmarks
- Regulatory Accounting in Practice
- Stakeholders' Forum
- BEREC annual report on activities and developments in the sector
- Engagement with the EU institutions
  - Cooperation with the EU institutions
  - Information Sharing Portal
- International Cooperation



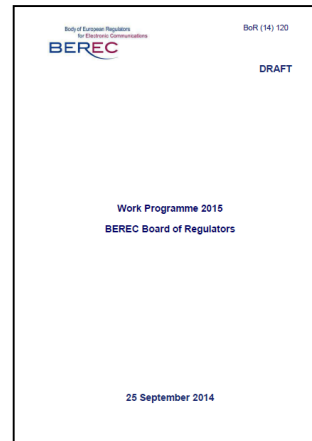
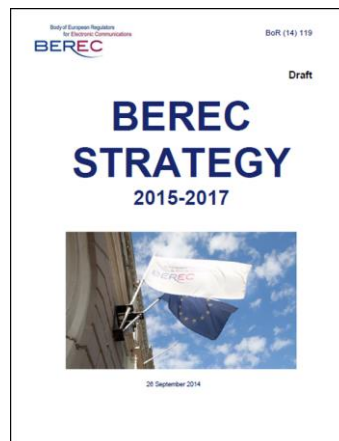


## ■ Outputs (includes 2015 and some leftovers in 2016)



		Number of Outputs
2015	Q1	2
	Q2	6
	Q3	5
	Q4	8
2016	Q1	2
	Q2	1
Deadlines not defined		9
Total		33

- **Public consultation** – from 29 September to 24 October
- **Hearing within the scope of the stakeholders' forum** – 16 October
- **Final approval** of the BEREC Strategy & WP 2015 and report of the public consultation



THANK YOU